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Potential for strong market growth in the Dutch grid connected PV market

The Dutch PV market has the potential to reach a yearly growth of over 40% with a cumulative capacity of between 75 and 155 MWp in 2007. This can be reached under the condition that the current government policies including the financial instruments will be maintained and expecting a yearly price decrease for turn-key PV systems of 6%. An even larger market potential exists with the use of additional financial instruments, resulting in a market potential of 500 MWp in 2007.

These are the results of an extensive market research *The PV market after 2000*, carried out by the independent consultant Ekomatic Solar Energy Consultancy, which was assigned by Novem for the PV platform. The PV platform, that consists of 27 signers of the PV Agreement, was delighted with the results that were presented at a meeting on March 16. The initiative to research the PV market was motivated by the changing phases of development in the grid connected PV market, in which increasingly more attention is paid to the demand side of the PV market. The research underlines the importance of a segmented market approach. For several market segments a specially tailored approach is desirable to be able to take a full advantage of the opportunities the specific market segments offer.

The research report will be used as a tool to generate discussion in establishing a new national PV Covenant (Gentlemen's Agreement) for the period of 2001 until 2007. The PV Covenant that is currently effective includes the objective to realise 7,7 MWp in grid connected PV capacity and is due to end this year. The objective that was aimed for will be fully complied with. It is very important that the new agreement will in turn include an ambitious, but realistic objective. It turned out that all (international) parties concerned put great value on the agreement, using the set down agreements to formulate company policy.

The report presents the results of market research in the eleven most important market segments, describing threats and opportunities in each market segment. For each segment a qualitative as

well as a quantitative analysis has been made of the expected future developments. Furthermore, the market research provides a large source of quantitative information. The research by Ekomatic shows that for several market segments a specially designed approach is needed to fully take advantage of the market potential. Segments with a high market potential are PV energy as a component of green energy products and as a stand alone product: PV on existing residential buildings or new housing development. An even higher potential segment that can be explored using additional instruments is PV on office and industrial buildings and government-owned property (including educational facilities).

For more information please contact the PV Platform secretary Mr. E.J. Koot (tel: 010 2807264). A summary or copy of the full report can be ordered by email e.j.koot@ekomatic.nl or can be downloaded at the website www.ekomatic.nl.